

## **Wisconsin Weatherization Assistance Program**

### **Limited Weatherization Services – Policy & Specifications – FY2016 (rev. 07/29/2015)**

#### **1 Limited Weatherization (Wx) Services – General Policy**

Limited Weatherization Services is a program available for 1 – 24 unit dwellings, and is funded with Public Benefits and EAP funds. Receipt of Limited Wx Services does not prevent an eligible unit from receiving full weatherization services in the future.

**1.1** Grantees shall target Limited Wx Services through outreach to these identified priority groups – elderly, disabled and young children (under 6 years old). However, membership in one or more of these priority groups does not determine whether the dwelling will receive full weatherization or Limited Wx, or both. Innovative approaches to outreach may include coordination with WHEAP agencies and/or providing incentives to targeted WHEAP clients, which may increase receptiveness to full weatherization or Limited Wx Services.

**1.2** Households are eligible for Limited Wx Services when they meet all eligibility requirements for the weatherization program. Such households could include:

- Units with a deferral status; or
- Units that have no cost-effective Energy Conservation Measures (ECMs) to perform under full weatherization (these units shall have a unit status of “No Treatment”); or
- Households that are referred by the WHEAP agency and receive heating system work under the Home Energy Plus Furnace Program, such as Emergency Furnace or Non-Emergency Furnace services; or
- Households with high electrical use.

While following the Weatherization Program Manual policy guidance, the Grantee may offer Limited WX Services to any client that is eligible for weatherization services. Limited Weatherization Services and full weatherization do not have to be completed within the same contract year. Units that receive Limited Wx Services are candidates to receive full weatherization in the future.

**1.3** A Weatherization Assistant energy audit is not required for dwellings to be considered for Limited Wx Services under this pilot.

**1.4** The Grantee may define the most effective method for delivering Limited Wx Services. The Grantee shall complete an initial visit to assess Limited Wx needs prior to delivery of the refrigerator and/or the freezer measures. The Grantee may complete lighting measures during the initial visit. If the Grantee performed an energy audit of the dwelling, then that audit may count as the initial visit; however, the Grantee shall verify that the audit reflects the current building conditions, including that appliances observed during the energy audit are still present.

#### **2 Other Weatherization Manual requirements**

**2.1** Applicable Weatherization Program Manual requirements relating to materials and provision of services apply, with the exception of items identified in this policy (e.g., not requiring the use of Weatherization Assistant) and any additional specific Limited Wx Pilot requirements (e.g., recordkeeping, measures and decision criteria, quality control and warranty period).

**2.2** The Grantee shall use the Limited Weatherization Services Work Agreement. The Grantee shall address rental-property-related items such as owner contribution and ownership of appliance(s), as required.

**2.3** Chapter 8.2, Client Files, applies as follows for dwellings that receive Limited Wx Services:

- Retain items 1 – 4 at a minimum, and all documentation (including photographs) relating to site conditions, expenses and decisions/activities performed related to the dwelling.
- Recordkeeping requirements related to qualification for services, status determinations (e.g., deferral or no treatment), and rental property apply.
- Photographs, or references to the location of photos, shall include, at a minimum:
  - ✓ The frontal view of the unit's exterior;
  - ✓ Each appliance prior to replacement, including the nameplate showing model information, etc.

**2.4** Owner contribution - exception to Manual: In rental units where the owner is responsible for paying electric costs, or multifamily units where electric is master-metered, the owner is required to make a cash contribution to the Agency amounting to at least 15% of the total cost of the weatherization work.

Exception: Owners who are themselves eligible for weatherization services may not be required to make contributions.

(Note that owners are limited to making a cash contribution; owner-installed materials and labor are not an option, nor are a rent rebate or reduction.)

**2.5** The Grantee may elect not to provide the Limited Wx customer with a Weatherization Customer Guidebook.

### **3 Limited Wx Measures**

The table following this paragraph provides a summary of the measures included as Limited Wx Services, along with applicable requirements. The Grantee's delivery of Limited Wx Services shall meet or exceed the standards contained in the Weatherization Program Manual. The Grantee shall recommend measures on the basis of the requirements; however, client acceptance of all recommended measures is not required.

Limited Wx Program Allowable Measures	
Lighting – follow full weatherization requirements (see Weatherization Program Manual).	CFL 3-Way Bulb
	CFL Bulb
	Exterior
	Halogen Torchiere Replacement
	LED Exit Light
Refrigerator – follow requirements identified in Section 3.1	Remove Additional Unit(s)
	Replacement
Freezer– follow requirements identified in Section 3.2	Remove Additional Unit(s)
	Replacement

### **3.1 Limited Wx Program - Refrigerator Replacement and Removal**

**General Policy & Specifications Requirements:** Follow all applicable policies and requirements in the Weatherization Program Manual, with the exception of the refrigerator replacement criteria below.

REPLACEMENT CRITERIA: A functioning refrigerator manufactured on or before December 31<sup>st</sup>, 2003 is eligible for replacement with a properly sized unit. The Grantee may replace a newer refrigerator if NEAT/MHEA modeling indicates a Savings to Investment Ratio (SIR) of 1.0 or greater for the replacement.

### **3.2 Limited Wx Program – Freezer Replacement and Removal**

**General Policy & Specifications Requirements:** Follow the applicable policies and requirements in the Weatherization Program Manual (see Appendices B.5.3, C.3 and D.4.3), with the exception of the freezer replacement criteria below.

REPLACEMENT CRITERIA: A functioning freezer manufactured on or before December 31<sup>st</sup>, 2003, and greater than or equal to 14 cubic feet, is eligible for replacement with a manual-defrost unit of comparable or smaller size. Consolidation of two replacement eligible units with a single replacement is allowed. The Grantee may replace a newer freezer, if NEAT/MHEA modeling indicates an SIR of 1.0 or greater for the replacement.

## **4 Limited Wx Program – Reported Units, and Quality Control**

A dwelling does not need to receive all allowable Limited Wx measures in order to be reported as a Limited Wx unit. A final inspection is not required for every unit that receives Limited Wx Services. Section 1.2.5 Quality Control System requirements are modified for Limited Wx units as follows:

- For 5% of units that receive Limited Wx Services, and all Limited Wx units for which a complaint is received from the client or the contractor, apply items 3 – 10.

If the Limited Wx job receives full weatherization, that inspection may count toward meeting the requirement.

## **5 Refrigerator and Freezer Specifications**

Technical specifications are available on the [HE+ Procurement Information](#) page in Refrigerator/Freezer Attachment 4.

## **6 Future Full Weatherization**

When full weatherization will occur within one year of completing the Limited Wx job, include the original refrigerator or freezer information in the Weatherization Assistant energy audit. A comment should be entered in the comment box on the Baseload tab for refrigerators, or on the Itemized Cost tab for freezers, to explain that replacement(s) occurred under Limited Weatherization.

## **7 Warranty Requirements**

The Grantee shall warranty workmanship and products for at least one year commencing from date of installation.

To avoid excess costs associated with replacing failed light bulbs, light bulbs that fail within the warranty period shall be exchanged in a cost-effective manner, such as having customers bring failed bulbs into the Grantee office for exchange.

## **8 Reporting Limited Wx Program Jobs in WisWAP**

Complete the Building Unit Status field to properly characterize the reason the building did not receive treatment as a Regular Wx Unit. Identify a unit that receives no treatment due to no cost-effective ECMs as having a unit status of “No Treatment – No cost effective ECM.” A unit that has a status of “Deferred” shall meet Weatherization Program Manual requirements for deferral, and the reason(s) for deferral shall be selected in WisWAP. Report measures installed for the Limited Wx Program only under “Baseload Job” in WisWAP.

Mobile Homes are not reportable under the Limited Weatherization program. These units shall be reported as a regular unit. If the unit comes out of deferral status, contact the HE+ Help Desk at [heat@wisconsin.gov](mailto:heat@wisconsin.gov) to request a rework job be created to account for the additional measures being reported.

## **9 Expenditures, Budget Lines and Direct Labor Rate**

Charge to the Wx Operations budget line only those costs associated with the *installation* of Limited Wx measures (e.g., measure-hours and materials). Charge support costs related to Limited Wx Services to the Wx Program Support budget line as allowable.

Count Limited Wx measure-hours toward Available Production Hours in the Direct Labor Rate calculation — do not deduct Limited Wx measure-hours.

The Grantee may shift unspent Limited Wx funds to the Wx Operations, Wx Health & Safety, or Wx Program Support budget lines.

Use Public Benefits or EAP funds to pay for Limited Wx Services Program Support costs.